User Group: Partner ARIES Administrator

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Υ	
Demographics Tab	Υ	Υ	Υ	
Contact by mail,				
phone, confidential		Y		
Client Identifiers		Y		
Sexual Orientation	Υ	Y		
Related or Affected				
Individuals	Y	Y	Y	Y
HOPWA	Y	Y		
Agency Specifics	Υ	Y	Y	
Share Status	V	Y	V	V
Eligibility Tab	Y	Y	Y	Υ
Financial Programs Tab	Y	Y	V	V
Programs Tab	Y	Y	Y	Y
Program Enrollment	Y	Y	Ť	Ť
Staff Assignment	Y	Y	V	Y
EIP TMP	Y	Y	Y	Y
Outcome for TMP	T	Y	T	T
CMP/MCWP	Y	Y	Y	Υ
CARE/HIPP	Y	Y		
Medical Tab	Y	Y	Y	Υ
Basic Medical	Y	Y	Y	Y
Medical History	Y	Y	Y	Y
STI/Hepatitis	Y	Y	Y	Y
Medications Tab	Y	Y	Y	Y
Risk Factors Tab	Y	Y	•	
Substance Abuse History	Y	Y		
Mental Health History	Y	Y		
Care Plan Tab				
Needs Assessment	Υ		Υ	
Care Plan	Υ	Υ	Υ	Υ
Interventions	Υ	Υ	Υ	Υ
Referrals	Υ	Υ	Υ	Υ
Referral Outcome		Υ		
Referral Target and				
Follow-up Date/Reason		Y		
Case Notes Tab				Υ
Legal Notes	Υ	Υ	Υ	
Mental Health Notes	Υ	Υ	Υ	
Substance Abuse Notes	Υ	Υ	Υ	
Client Incident and				
Grievance Report Notes	Υ	Υ	Υ	
All Other Notes	Υ	Y	Υ	
Sign and Seal	Υ	Υ		
Services	Y	Υ	Y	Υ
Agency	Υ	Y	Y	Υ
CADR	Y	.,	.,	.,
Staff Screen	Y	Y	Y	Υ
Permission for Staff	Y	Y	Y	.,
Reports	Y	Y	Y	Υ
Client	Y			
Services	Y			
Finance	Y			
Management	Y			
Cross Tab Wizard	Y			
Compliance Save Report	Ť			
Save Report				

User Group: Administrative Agency ARIES Administrator (Fiscal Agents/Counties)

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Y		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Y	
Demographics Tab	Υ	Υ	Υ	
Contact by mail,				
phone, confidential		Y		
Client Identifiers		Υ		
Sexual Orientation	Υ	Y		
Related or Affected				
Individuals	Y	Y	Y	Υ
HOPWA	Υ	Y	V	
Agency Specifics	Y	Y	Y	
Share Status	V	Y	V	V
Eligibility Tab	Y	Y	Υ	Υ
Financial Programs Tab	Y	Y	V	Y
Programs 1ab Program Enrollment	Y	Y	Y	Y
Staff Assignment	Y	Y	Ī	Ī
EIP	Y	Y	Y	Υ
TMP	Y	Y	Y	Y
Outcome for TMP		Y	•	
CMP/MCWP	Υ	Ϋ́	Υ	Υ
CARE/HIPP	Y	<u>'</u>	•	
Medical Tab	Y	Υ	Υ	Y
Basic Medical	Y	Y	Y	Y
Medical History	Y	Y	Y	Y
STI/Hepatitis	Y	Y	Y	Y
Medications Tab	Υ	Y	Υ	Υ
Risk Factors Tab	Υ	Υ		
Substance Abuse History	Υ	Υ		
Mental Health History	Υ	Y		
Care Plan Tab				
Needs Assessment	Υ		Υ	
Care Plan	Υ	Υ	Υ	Υ
Interventions	Υ	Υ	Υ	Υ
Referrals	Υ	Υ	Υ	Υ
Referral Outcome		Y		
Referral Target and				
Follow-up Date/Reason		Y		
Case Notes Tab	V	V	V	Υ
Legal Notes	Y	Y	Y	
Mental Health Notes	Y	Y	Y	
Substance Abuse Notes Client Incident and	T	T	T T	
Grievance Report Notes	Υ	Y	Y	
All Other Notes	Y	Y	Y	
Sign and Seal	Y	Y		
Services	Y	Y	Υ	Υ
Agency	Y	Y	Y	Y
CADR	Y			
Staff Screen	Y	Υ	Y	Y
Permission for Staff	Y	Y	Y	-
Reports	Y	Y	Y	Υ
Client	Υ			
Services	Υ			
Finance	Υ			
Management	Υ			
Cross Tab Wizard	Υ			
Compliance	Υ			
Save Report				

User Group: Agency ARIES Admin (IT/MIS staff)

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Y			
Social Security Number	Y			
Affected Client	Υ			
New Client/URN Elements			Υ	
Demographics Tab	Υ	Υ	Υ	
Contact by mail,				
phone, confidential		Υ		
Client Identifiers		Υ		
Sexual Orientation	Y	Υ		
Related or Affected				
Individuals	Y	Υ	Υ	Υ
HOPWA	Υ	Υ		
Agency Specifics	Υ	Υ	Y	
Share Status		Υ		
Eligibility Tab	Y	Υ	Y	Υ
Financial	Υ	Υ		
Programs Tab	Υ	Υ		Y
Program Enrollment	Υ	Y		
Staff Assignment	Υ	Υ		
EIP	Υ	Y	Υ	Υ
TMP		Y		
Outcome for TMP		Y		
CMP/MCWP	Υ	Υ		
CARE/HIPP	Υ			
Medical Tab	Υ	Υ	Υ	Υ
Basic Medical	Υ	Υ	Υ	Υ
Medical History	Υ	Υ	Υ	Υ
STI/Hepatitis	Υ	Υ	Υ	Υ
Medications Tab	Υ	Υ	Υ	Υ
Risk Factors Tab	Υ	Υ		
Substance Abuse History	Υ	Υ		
Mental Health History	Y	Υ		
Care Plan Tab				
Needs Assessment	Y		Y	
Care Plan	Υ	Υ	Υ	Υ
Interventions	Υ	Υ	Υ	Υ
Referrals	Υ	Υ	Y	Υ
Referral Outcome		Υ		
Referral Target and				
Follow-up Date/Reason		Υ		
Case Notes Tab				Υ
Legal Notes	Υ	Y	Υ	
Mental Health Notes	Υ	Y	Υ	
Substance Abuse Notes	Υ	Y	Υ	
Client Incident and				
Grievance Report Notes	Υ	Y	Υ	
All Other Notes	Υ	Υ	Y	
Sign and Seal	Υ	Υ		
Services	Y	Y	Y	Υ
Agency	Y	Y		
CADR	Υ	.,	.,	.,
Staff Screen	Y	Y	Y	Υ
Permission for Staff	Y	Y	Υ	Υ
Reports	Y	Y	Υ	Υ
Client	Y			
Services	Y			
Finance	Y			
Management	Y			
Cross Tab Wizard	Y			
Compliance	Υ			
Save Report				

User Group: Agency Management

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Υ	
Demographics Tab	Υ	Υ	Υ	
Contact by mail,				
phone, confidential		Υ		
Client Identifiers		Y		
Sexual Orientation	Υ	Υ		
Related or Affected				
Individuals	Υ	Υ	Υ	Υ
HOPWA	Υ	Υ		
Agency Specifics	Υ	Y	Υ	
Share Status		Y		
Eligibility Tab	Υ	Υ	Υ	Υ
Financial	Υ	Υ		
Programs Tab	Υ	Υ	Υ	Υ
Program Enrollment	Y	Y	Υ	Y
Staff Assignment	Y	Y		
EIP	Υ	Y	Y	Υ
TMP	Υ	Υ	Y	Y
Outcome for TMP		Y		
CMP/MCWP	Y	Y	Y	Υ
CARE/HIPP	Y		3.6	
Medical Tab	Y	Y	Y	Υ
Basic Medical	Y	Y	Y	Υ
Medical History	Υ	Y	Υ	Υ
STI/Hepatitis	Y	Y	Υ	Υ
Medications Tab	Y	Y	Υ	Υ
Risk Factors Tab	Y	Y		
Substance Abuse History	Y	Υ		
Mental Health History	Υ	Υ		
Care Plan Tab	V		V	
Needs Assessment	Y	V	Y	V
Care Plan	Y	Y	Y	Y
Interventions	Y	Y	Y	Y
Referrals	Ť	Y	Υ	Υ
Referral Outcome		<u> </u>		
Referral Target and				
Follow-up Date/Reason Case Notes Tab		Y		V
	Y	V	Y	Υ
Legal Notes Mantal Health Notes	Y	Y	Y	
Mental Health Notes Substance Abuse Notes	Y	Y	Y	
Client Incident and	ī	ľ	ī	
	Υ	Υ	Υ	
Grievance Report Notes All Other Notes	Y	Y	Y	
Sign and Seal	Y	Y	Ĭ	
Services	Y	Y	Y	Υ
Agency	Y	Y	I	I
CADR	Y	I		
Staff Screen	Y	Y	Y	Y
Permission for Staff	Y	Y	Y	<u>'</u>
Reports	Y	Y	Y	Υ
Client	Y		·	
Services	Y			
Finance	<u>'</u> Ү			
Management	Y			
Cross Tab Wizard	Y			
Compliance	Y			
Save Report	•			
Said Hoport				

User Group: Ancillary Services

Appointment	Function	View	Change	Create	Deactivate
Client Search	Appointments	Υ	Υ	Υ	Υ
Social Security Number	Appointment Outcome		Υ		
Affected Client	Client Search				
New Client/URN Flements					
Demographics Tab		Υ			
Contact by mail, phone, confidential					
phone, confidential Client Identifiers Sexual Orientation Y Related or Affected Individuals Y Y Y Y Y Y Y Y Y		Υ	Y	Y	
Client Identifiers Sexual Orientation Y Related or Affected Individuals Y Y Y Y Y Y Y Y Y	=				
Sexual Orientation Y Related or Affected Individuals Y Y Y Y Y Y Y Y Y					
Related or Affected		٧			
Individuals					
HOPWA		Υ	Υ	Υ	Υ
Share Status				-	
Share Status		Υ		Υ	
Financial					
Programs Tab	Eligibility Tab	Υ	Υ	Y	Y
Program Enrollment	Financial	Υ	Y		
Staff Assignment					
EIP Y TMP Y Outcome for TMP Y					
TMP					
Outcome for TMP CMP/MCWP Y CARE/HIPP Y CARE/HIPP Y Medical Tab Basic Medical Basic Medical History STI/Hepatitis STI/Hepatitis STI/Hepatitis Medications Tab Risk Factors Tab SUBstance Abuse History Substance Abuse History Mental Health History Care Plan Tab Substance Abuse History Mental Health History Care Plan Tab Y Tab Substance Abuse History Mental Health History Care Plan Tab Y Tab Substance Abuse Ab					
CMP/MCWP		Υ	-		
CARE/HIPP Y Medical Tab Basic Medical History STI/Hepatitis Medications Tab Risk Factors Tab Substance Abuse History Mental Health History Care Plan Tab Needs Assessment Y Care Plan Tab Needs Assessment Y Tab		V			
Medical Tab Basic Medical Medical History STI/Hepatitis Medications Tab Risk Factors Tab Substance Abuse History Mental Health History Care Plan Tab Y Needs Assessment Y Care Plan Y Interventions Y Referrals Y Referral Outcome Y Referral Target and Follow-up Date/Reason Y Follow-up Date/Reason Y Case Notes Tab Y Legal Notes Y Mental Health Notes Y Substance Abuse Notes Y Client Incident and Grievance Report Notes Y All Other Notes Y Y Y Sign and Seal Y Y Y Services Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y <tr< td=""><td></td><td></td><td></td><td></td><td></td></tr<>					
Basic Medical History STI/Hepatitis		T			
Medical History STI/Hepatitis Medications Tab Risk Factors Tab Substance Abuse History Substance Abuse History Mental Health History Care Plan Tab Needs Assessment Y Care Plan Y Interventions Y Referral Y Referral Outcome Y Referral Target and Y Follow-up Date/Reason Y Case Notes Tab Image: Case Notes Tab					
STI/Hepatitis Medications Tab Substance Abuse History Mental Health History Care Plan Tab Needs Assessment Y					
Medications Tab Risk Factors Tab Substance Abuse History ————————————————————————————————————					
Substance Abuse History Mental Health History Care Plan Tab Needs Assessment Y Care Plan Interventions Y Referrals Y Referrals Y Referral Target and Follow-up Date/Reason Case Notes Tab Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Services Y Y Agency Y CADR Y Staff Screen Permission for Staff Reports Management Cross Tab Wizard Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y					
Mental Health History Care Plan Tab Needs Assessment Y Care Plan Interventions Y Referrals Y Referrals Y Referral Outcome Referral Target and Follow-up Date/Reason Case Notes Tab Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Services Y Services Y Staff Screen Y Permission for Staff Reports Y Y Y Y Y Y Y Y Y Y Client Y Services Y Y Y Y Y Y Y Client Y Services Y Y Y Y Y Y Y Client Y Services Y Y Y Y Y Y Y Client Y Services Y Finance Management Cross Tab Wizard Y Compliance	Risk Factors Tab				
Care Plan Tab Y Needs Assessment Y Care Plan Y Interventions Y Referrals Y Referral Outcome Y Referral Target and Follow-up Date/Reason Y Follow-up Date/Reason Y Case Notes Tab Image: Comparition of the comparities of the comparition of the comparities of the com	Substance Abuse History				
Needs Assessment	Mental Health History				
Care Plan Y Interventions Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y	Care Plan Tab				
Interventions					
Referrals Y Y Referral Outcome Y Y Referral Target and Follow-up Date/Reason Y Y Case Notes Tab					
Referral Outcome Y Referral Target and Y Follow-up Date/Reason Y Case Notes Tab			V		
Referral Target and Follow-up Date/Reason Case Notes Tab Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Sign and Seal Y Services Y Agency CADR Staff Screen Permission for Staff Reports Client Y Y Y Y Y Y Y Y Y Y Y Y Y		Ť			
Follow-up Date/Reason Case Notes Tab Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Y Y Sign and Seal Y Services Y Y Agency CADR Y Staff Screen Y Permission for Staff Reports Y Client Y Services Y Finance Management Cross Tab Wizard Y			T T		
Case Notes Tab Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes Y All Other Notes Y Sign and Seal Y Services Y Y Y Agency Y CADR Y Staff Screen Y Permission for Staff Y Reports Y Y Y Services Y Finance Management Cross Tab Wizard Y Compliance Y	_		V		
Legal Notes Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Y Y Sign and Seal Y Services Y Agency CADR Y Staff Screen Permission for Staff Reports Y Client Y Services Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y					
Mental Health Notes Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y Y Y Y Sign and Seal Y Services Y Agency Y CADR Y Staff Screen Permission for Staff Reports Y Client Y Services Y Y Y Y Y Y Y Y Y Y Y Y Y Client Y Services Y Finance Management Cross Tab Wizard Y Compliance					
Substance Abuse Notes Client Incident and Grievance Report Notes All Other Notes Y					
Grievance Report Notes All Other Notes Y Y Sign and Seal Y Services Y Agency Y CADR Y Staff Screen Y Permission for Staff Reports Y Client Services Y Finance Management Cross Tab Wizard Y Compliance Y Y Y Y Y Y Y Y Y Y Y Y Client Cross Tab Wizard Y Compliance Y Compliance Y Y Y Y Y Y Y Y Y Y Y Y Y Y Y Client Cross Tab Wizard Y Compliance Y Compliance Y Compliance Y Compliance Cross Tab Wizard Cross Tab W					
All Other Notes Y Y Sign and Seal Y Y Services Y Y Agency Y Y CADR Y Y Staff Screen Y Y Permission for Staff Y Y Reports Y Y Client Y Y Services Y Y Finance Management Cross Tab Wizard Compliance Y Y					
Sign and Seal Y Services Y Y Y Agency Y CADR Y Staff Screen Y Permission for Staff Y Reports Y Y Client Y Services Y Finance Y Management Y Cross Tab Wizard Y Compliance Y					
Services Y Y Agency Y CADR Y Staff Screen Y Permission for Staff Reports Y Y Y Client Y Services Y Finance Management Cross Tab Wizard Y Compliance Y			Y	Y	
Agency Y CADR Y Staff Screen Y Permission for Staff					
CADR Y Staff Screen Y Permission for Staff Y Reports Y Y Client Y Services Y Finance Management Cross Tab Wizard Y Compliance Y				Y	
Staff Screen Y Permission for Staff Y Reports Y Client Y Services Y Finance Wanagement Cross Tab Wizard Y Compliance Y					
Permission for Staff Y Y Y Y Y Y Y Y Y Y Y Client Y <td></td> <td></td> <td></td> <td></td> <td></td>					
Reports Y Y Y Client Y Services Y Finance Wanagement Services Y Cross Tab Wizard Y Y Compliance Y Y		ı			
Client Y Services Y Finance Management Cross Tab Wizard Y Compliance Y		Υ	Y	Y	Y
Services Y Finance Management Cross Tab Wizard Y Compliance Y					-
Finance Management Cross Tab Wizard Compliance Y					
Management Cross Tab Wizard Y Compliance Y					
Compliance Y	Management				
Save Report		Υ			
	Save Report				

User Group: CARE/HIPP (Office of AIDS Staff)

Function	View	Change	Create	Deactivate
Appointments				
Appointment Outcome				
Client Search	Υ			
Social Security Number	Υ			
Affected Client				
New Client/URN Elements				
Demographics Tab	Υ	Y	Υ	
Contact by mail,				
phone, confidential		Υ		
Client Identifiers		Υ		
Sexual Orientation	Υ	Υ		
Related or Affected				
Individuals				
HOPWA	Υ			
Agency Specifics	Υ	Υ	Υ	
Share Status		Υ		
Eligibility Tab	Υ	Υ	Υ	
Financial	Υ	Υ		
Programs Tab	Υ	Υ	Y	
Program Enrollment	Υ	Υ	Y	Υ
Staff Assignment				
EIP	Υ			
TMP				
Outcome for TMP				
CMP/MCWP	Y			
CARE/HIPP	Υ	Y		
Medical Tab	Y	Y	Y	
Basic Medical	Y	Y	Y	
Medical History				
STI/Hepatitis Medications Tab				
Risk Factors Tab	Y	Y		
Substance Abuse History	ı	<u> </u>		
Mental Health History				
Care Plan Tab				
Needs Assessment				
Care Plan				
Interventions				
Referrals				
Referral Outcome				
Referral Target and				
Follow-up Date/Reason				
Case Notes Tab				
Legal Notes				
Mental Health Notes		1	İ	
Substance Abuse Notes				
Substance Abuse Notes Client Incident and				
Client Incident and				
Client Incident and Grievance Report Notes All Other Notes Sign and Seal				
Client Incident and Grievance Report Notes All Other Notes	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff		Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client Services	Y Y Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client Services Finance	Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client Services Finance Management	Y Y Y Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client Services Finance Management Cross Tab Wizard	Y Y Y Y	Y	Y	
Client Incident and Grievance Report Notes All Other Notes Sign and Seal Services Agency CADR Staff Screen Permission for Staff Reports Client Services Finance Management	Y Y Y Y	Y	Y	

User Group: Case Manager

Function	View	Change	Create	Deactivate
Appointments	Y	Υ	Υ	Υ
Appointment Outcome		Y		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Y	
Demographics Tab	Y	Y	Υ	
Contact by mail,		,		
phone, confidential		Y		
Client Identifiers Sexual Orientation	Υ	Y		
Related or Affected	1	1		
Individuals	Y	Y	Υ	Υ
HOPWA	Y	Y	•	
Agency Specifics	Y	•	Υ	
Share Status	•		•	
Eligibility Tab	Y	Y	Y	Υ
Financial	Υ	Υ		
Programs Tab	Υ	Y	Υ	Υ
Program Enrollment	Υ	Υ	Υ	Υ
Staff Assignment	Y	Y		
EIP	Y	Y	Υ	Υ
TMP	Υ	Υ	Υ	Υ
Outcome for TMP		Υ		
CMP/MCWP	Υ	Y	Υ	Υ
CARE/HIPP	Υ			
Medical Tab	Υ	Y	Y	Y
Basic Medical	Y	Y	Y	Υ
Medical History	Y	Y	Y	Y
STI/Hepatitis Medications Tab	Y	Y	Y	Y
Risk Factors Tab	Y	Y	Ť	Ť
Substance Abuse History	Y	Y		
Mental Health History	Y	Y		
Care Plan Tab	•	•		
Needs Assessment	Y		Y	
Care Plan	Υ	Y	Υ	Υ
Interventions	Υ	Υ	Υ	Υ
Referrals	Y	Υ	Υ	Υ
Referral Outcome		Υ		
Referral Target and				
Follow-up Date/Reason		Υ		
Case Notes Tab				Υ
Legal Notes	Υ	Y	Υ	
Mental Health Notes	Y	Y	Y	
Substance Abuse Notes	Y	Υ	Y	
Client Incident and	V			
Grievance Report Notes	Y	Y	Y	
All Other Notes Sign and Seal	Y	T T	Ĭ	
Services	Y		Y	
Agency	Y		' '	
CADR	Y			
Staff Screen	Y			
Permission for Staff	-			
Reports	Υ	Y	Υ	Υ
Client	Y			
Services	Y			
Finance				
Management				
Cross Tab Wizard	Υ			
Compliance	Υ			
Save Report				

User Group: Data Entry

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Y			
New Client/URN Elements			Y	
Demographics Tab	Υ	Y	Υ	
Contact by mail,		Y		
phone, confidential Client Identifiers		Y		
Sexual Orientation	Υ	Y		
Related or Affected	•			
Individuals	Υ	Υ	Y	Υ
HOPWA	Υ	Υ		
Agency Specifics	Υ	Υ	Υ	
Share Status		Υ		
Eligibility Tab	Υ	Υ	Υ	Υ
Financial	Υ	Υ		
Programs Tab	Υ	Υ	Υ	Υ
Program Enrollment	Υ	Υ	Y	Υ
Staff Assignment	Υ	Υ		
EIP	Y	Y	Y	Y
TMP Outcome for TMP	Υ	Y	Y	Υ
CMP/MCWP	Y	Y	Y	Y
CMF/MCWF CARE/HIPP	Y	I I	1	1
Medical Tab	Y	Υ	Y	Y
Basic Medical	Y	Y	Y	Y
Medical History	Y	Y	Y	Y
STI/Hepatitis	Υ	Υ	Y	Y
Medications Tab	Υ	Y	Y	Υ
Risk Factors Tab	Υ	Υ		
Substance Abuse History	Y	Υ		
Mental Health History	Υ	Υ		
Care Plan Tab				
Needs Assessment	Y	V	Y	V
Care Plan Interventions	Y	Y	Y	Y
Referrals	Y	Y	Y	Y
Referral Outcome	•	Y	•	
Referral Target and		·		
Follow-up Date/Reason		Υ		
Case Notes Tab				Y
Legal Notes	Υ	Υ	Υ	
Mental Health Notes	Υ	Υ	Υ	
Substance Abuse Notes	Υ	Υ	Y	
Client Incident and				
Grievance Report Notes	Y	Y	Y	
All Other Notes Sign and Seal	Y	Y Y	Y	
Sign and Seal Services	Y		Y	
Agency	Y		'	
CADR	Y			
Staff Screen	Y			
Permission for Staff				
Reports	Y	Y	Y	Υ
Client	Y			
Services	Υ			
Finance				
Management				
Cross Tab Wizard	Y			
Compliance Save Report	Y			
Save Report				

User Group: Medical

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Y	-	
Client Search	Y			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Υ	
Demographics Tab	Υ	Υ	Y	
Contact by mail,				
phone, confidential				
Client Identifiers				
Sexual Orientation	Υ			
Related or Affected				
Individuals	Υ	Υ	Υ	Υ
HOPWA	Υ	Υ		
Agency Specifics	Υ		Υ	
Share Status				
Eligibility Tab	Υ	Υ	Υ	Υ
Financial	Υ	Υ		
Programs Tab	Υ	Υ	Υ	Υ
Program Enrollment	Υ	Υ	Υ	Υ
Staff Assignment	Υ	Υ		
EIP	Υ	Υ	Υ	Υ
TMP	Υ	Υ	Υ	Υ
Outcome for TMP		Υ		
CMP/MCWP	Υ	Υ	Υ	Υ
CARE/HIPP	Υ			
Medical Tab	Υ	Υ	Y	Υ
Basic Medical	Υ	Υ	Υ	Υ
Medical History	Υ	Υ	Υ	Υ
STI/Hepatitis	Υ	Υ	Υ	Υ
Medications Tab	Υ	Υ	Υ	Υ
Risk Factors Tab	Υ	Υ		
Substance Abuse History	Υ	Υ		
Mental Health History	Υ	Υ		
Care Plan Tab				
Needs Assessment	Υ		Y	
Care Plan	Υ	Υ	Y	Υ
Interventions	Υ	Υ	Y	Υ
Referrals	Υ	Υ	Y	Υ
Referral Outcome		Υ		
Referral Target and				
Follow-up Date/Reason		Υ		
Case Notes Tab				Υ
Legal Notes	Υ	Υ	Y	
Mental Health Notes	Υ	Υ	Υ	
Substance Abuse Notes	Υ	Υ	Υ	
Client Incident and				
Grievance Report Notes	Υ	Υ	Υ	
All Other Notes	Υ	Υ	Υ	
Sign and Seal	Υ			
Services	Y		Υ	
Agency	Y			
CADR	Y			
Staff Screen	Υ			
Permission for Staff				
Reports	Y	Y	Υ	Υ
Client	Y			
Services	Y			
Finance				
Management				
Cross Tab Wizard	Y			
	Y			

User Group: Peer Advocate

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements			Y	
Demographics Tab	Y	Y	Υ	
Contact by mail,				
phone, confidential Client Identifiers				
Sexual Orientation	Y			
Related or Affected				
Individuals	Υ			
HOPWA	Υ			
Agency Specifics	Υ			
Share Status				
Eligibility Tab	Υ	Y	Υ	Υ
Financial	Υ			
Programs Tab	Υ			
Program Enrollment	Y			
Staff Assignment	Y	-		
EIP	Y			
TMP	Υ			
Outcome for TMP CMP/MCWP	Y			
CMP/MCWP CARE/HIPP	Y			
Medical Tab	•			
Basic Medical				
Medical History				
STI/Hepatitis				
Medications Tab				
Risk Factors Tab				
Substance Abuse History				
Mental Health History				
Care Plan Tab				
Needs Assessment	Y			
Care Plan Interventions	Y			
Referrals	Y			
Referral Outcome	•			
Referral Target and				
Follow-up Date/Reason				
Case Notes Tab				
Legal Notes				
Mental Health Notes				
Substance Abuse Notes				
Client Incident and				
Grievance Report Notes		1		
All Other Notes Sign and Seal				
Sign and Seal Services	Υ	 	Y	
Agency	Y		'	+
CADR	•			
Staff Screen				
Permission for Staff				
Reports				
Client				
Services				
Finance				
Management				
Cross Tab Wizard				
Compliance Save Report				
Sure Report				

User Group: Receptionist

Function	View	Change	Create	Deactivate
Appointments	Υ	Υ	Υ	Υ
Appointment Outcome		Υ		
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements				
Demographics Tab	Y	Y	Υ	
Contact by mail,				
phone, confidential Client Identifiers		-		
Sexual Orientation	Y			
Related or Affected				
Individuals	Υ			
HOPWA	Υ			
Agency Specifics	Υ			
Share Status				
Eligibility Tab	Υ	Y	Υ	Υ
Financial	Υ			
Programs Tab	Υ			
Program Enrollment	Y			
Staff Assignment	Y	-		
EIP	Y			
TMP Outcome for TMP	Υ	-		
CMP/MCWP	Y			
CARE/HIPP	Y			
Medical Tab				
Basic Medical				
Medical History				
STI/Hepatitis				
Medications Tab				
Risk Factors Tab				
Substance Abuse History				
Mental Health History				
Care Plan Tab	V			
Needs Assessment Care Plan	Y			
Interventions	Y			
Referrals	Y			
Referral Outcome	•			
Referral Target and				
Follow-up Date/Reason				
Case Notes Tab				
Legal Notes				
Mental Health Notes				
Substance Abuse Notes				
Client Incident and				
Grievance Report Notes All Other Notes		-		
Sign and Seal		+		
Services	Υ	1	Y	
Agency	Y	1	'	
CADR	-			
Staff Screen				
Permission for Staff				
Reports	Υ	Y	Y	Y
Client	Υ			
Services	Υ			
Finance				
Management Cross Tab Wizord	Υ			
Cross Tab Wizard Compliance	Y			
Save Report	Ī			
Sare Report				

User Group: Volunteer Staff

Function	View	Change	Create	Deactivate
Appointments	Υ	Y	Υ	
Appointment Outcome	•	Y	•	
Client Search	Υ			
Social Security Number	Υ			
Affected Client	Υ			
New Client/URN Elements				
Demographics Tab	Υ			
Contact by mail,				
phone, confidential				
Client Identifiers				
Sexual Orientation	Υ			
Related or Affected				
Individuals	Υ			
HOPWA	Υ			
Agency Specifics	Υ			
Share Status				
Eligibility Tab	Υ	Υ	Υ	Y
Financial	Υ			
Programs Tab	Y			
Program Enrollment	Y			
Staff Assignment	Y			
EIP	Y			
TMP	Υ			
Outcome for TMP	V			
CMP/MCWP	Y			
CARE/HIPP Medical Tab	Y			
Basic Medical				
Medical History STI/Hepatitis				
Medications Tab				
Risk Factors Tab				
Substance Abuse History				
Mental Health History				
Care Plan Tab				
Needs Assessment	Υ			
Care Plan	Y			
Interventions	Y			
Referrals	Y			
Referral Outcome				
Referral Target and				
Follow-up Date/Reason				
Case Notes Tab				
Legal Notes				
Mental Health Notes				
Substance Abuse Notes				
Client Incident and				
Grievance Report Notes				
All Other Notes				
Sign and Seal	_			
Services	Υ		Υ	
Agency				
CADR				
Staff Screen				
Permission for Staff				
Reports				
Client				
Services				
Finance				
Management				
Cross Tab Wizard				
Compliance Save Penert				
Save Report				